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ABSTRACT

The purpose of this Bulletin is to clarify the intent of shared decision making (SDM) and explore its benefits, drawbacks, and implementation. It looks at how the principal's role changes in SDM, stresses the need for training, examines conditions that affect successful implementation of SDM, and offers ideas on how schools can concentrate on significant educational issues. Following the introduction, chapter 1 summarizes the advantages and disadvantages of SDM. Chapter 2 describes teachers' and administrators' concerns about SDM that must be addressed, and chapters 3 and 4 discuss aspects of the principal's new role and the need for staff preparation. The fifth chapter offers guidelines for implementation, with a focus on structure and decision making. A model for the gradual evolution of responsibility is described. Nine lessons for avoiding the pitfalls of implementation are highlighted in chapter 6. The final chapter outlines how SDM is working at sites in four different states--the Colorado Independent School District (Texas), University Elementary School (Los Angeles), Dade County (Florida), and North Eugene High School (Eugene, Oregon). Three figures and an appendix containing a partial list of SDM-training programs and resources are included. (LMI)

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SHARED DECISION-MAKING

Lynn Balster Liontos

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Preface

Shared decision-making (SDM) is a prominent issue in local school governance today. Many articles have appeared about educators' experience with the process, though research on the effects of collective decision-making in an educational setting is still scanty. In districts where SDM has been mandated, school leaders may feel pressure to "jump on the band-wagon" without being fully aware of what SDM can and cannot do. The number of terms used to refer to the process creates confusion, as does the maze of different structures that are set up to implement SDM.

The purpose of this Bulletin is to clarify the intent of SDM and explore its benefits, drawbacks, and implementation. It looks at how the principal's role changes in SDM, stresses the need for training, examines conditions that affect successful implementation of SDM, and offers ideas on how schools can concentrate on significant educational issues. Although there is no one "right" way to "do" SDM, this Bulletin provides recommendations from the literature and suggestions from those who practice SDM. It also outlines how SDM is working at sites in four different states.

For those who want to move toward SDM, this condensation of research provides an overview of several issues related to the process. Schools that already practice SDM may find ways to enhance its effectiveness, plus they may benefit from suggestions for remedying areas where they are experiencing difficulty or frustration.

The author, Lynn Balster Liontos, a resident of Eugene, is a research analyst and writer. She has authored several publications on education-related topics, such as transformational leadership, family involvement in education, at-risk youth, and school/social service collaboration.

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Introduction

In 1983, a survey by the Heritage Foundation asked principals at sixty-five secondary schools what factors they considered most important in running their schools effectively ("Effective Principals Work Hard and Abhor Red Tape" 1984). Faculty participation, mentioned by 80 percent, topped the list.

In 1988, the Carnegie Foundation completed a comprehensive survey on the conditions of teaching. Few teachers, the survey found, are involved in making critical decisions (Ernest Boyer 1988). For example, 79 percent of teachers polled were involved in choosing textbooks, but only 7 percent played a part in selecting new teachers and administrators. As Boyer points out, teachers have been "front row spectators" rather than active participants in their schools. Fran Mayeski (1991) also notes that shared decision-making (SDM) has been identified by the American Association of School Administrators as one of six major challenges facing school leaders.

Lack of Clarity about SDM

Lack of definitional clarity is one of eight barriers to changing traditional behavior, according to the Heritage Foundation survey ("Effective Principals Work Hard . . ."). Many survey respondents reported uncertainty about the meaning of the concept itself, "indicating that there needs to be a *common language* and a set of understandings about shared decision making."

Educators use a variety of terms to refer to SDM, which is confusing at best. Two often-used terms are *school-based decision-making* and *shared governance.* The term *shared decision-making* (SDM) will be used throughout this Bulletin, except when a quoted author uses an alternative term.

Two terms often incorrectly interchanged with SDM are *decentralization* and *site-based management.* Decentralization refers to the transfer of authority to local school units; whether decisions are shared at the school

level is at the discretion of the principal. Thus decentralization may or may not include SDM. The same is true of site-based management (SBM), which can refer solely to the concept of decentralization—a shift in power from district offices to individual school buildings. Site-based management may also include SDM, but SDM is not a necessary component of SBM.

Defining SDM

SDM is an elusive, complex concept that is difficult to grasp. It involves fundamental changes in the way schools are managed, including changing the roles and relationships of all members of the school community. One key to successfully implementing SDM, states Scott Bauer (1992), is building consensus about what the process is. School decision teams discover, "with alarming regularity," that they are unsure precisely what SDM is. Bauer provides a working definition:

> Shared decision making is a process designed to push education decisions to the school level, where those closest to children may apply their expertise in making decisions that will promote school effectiveness and ensure that the most appropriate services are provided to students and the school community.

Bauer emphasizes that SDM is content-free; that is, it does not deal with specific topics or programs. Rather it is an ongoing process of making decisions in a collaborative manner. SDM "cannot be done once and then forgotten," states B. J. Meadows (1990).

The face of SDM looks different in different schools, depending on local factors. Judith Huddleston and others (1991) emphasize that tolerance for diversity is necessary when it comes to SDM.

In a study cited by Mayeski, the majority of teachers said their participation in the decision-making process was unsatisfying because their involvement seemed inconsequential. To be truly beneficial, Mayeski believes SDM must incorporate three components: involvement, influence, and accountability.

Shared Beliefs and Premises

All SDM processes are built on common premises or beliefs. Some of the premises are as follows:

1. Those closest to the students and "where the action is" will make the best decisions about students' education.
2. Teachers, parents, and school staff should have more say about

policies and programs affecting their schools and children.

3. Those responsible for carrying out decisions should have a voice in determining those decisions.
4. Change is most likely to be effective and lasting when those who implement it feel a sense of ownership and responsibility for the process.

The Purpose of SDM

The primary purpose of SDM is not to make teachers feel more satisfied with their work, notes Bauer, though it may have this effect. As a result of SDM, staff should have a greater impact on decisions, be better informed, and have greater commitment to making their decisions work. The purpose of SDM is to improve the quality of educational services and to ensure that schools are more responsive to the needs of students and the community.

"Student success and student achievement must be kept in the forefront of our thinking as the reason to implement site-based, shared decision making," states John Lange (1993). If districts establish SDM for the purpose of shifting accountability or abolishing a "top-heavy central office staff," SDM will be nothing more than another "buzzword," he contends. Decisions in the SDM process should be motivated by the goal of making schools and the total school program a better place for students.

Chapter 1

Advantages Versus Disadvantages

To ask whether teachers should be involved in SDM is the wrong question, states Allan Vann (1992). The right one is, Given a particular school and its cultural norms, how and to what degree should teachers be involved? Despite possible difficulties and drawbacks inherent in the SDM process, most participants believe the benefits of SDM outweigh the costs. The beneficiaries of SDM include principals, teachers, students, the school, and the local community.

Advantages of SDM

SDM has the potential to improve the quality of decisions, as well as bolster their acceptance and implementation, strengthen staff morale and teamwork, build trust, and increase school effectiveness.

In a fifteen-month study of six schools that adopted SDM, John Lange (1993) found that as autonomy was achieved, better decisions were made than would have been made under centralized school management. Generally educators agree with Meadows, who states that SDM has taught her that "several heads produce better decisions than one." More ideas can be generated and analyzed when more people are involved. Because more people have a voice, SDM also promotes varied and innovative approaches to issues. Although data in the field of education are limited, Mayeski cites research indicating that more satisfying decisions are made in groups that generate and test ideas than are made by individuals or poorly functioning groups.

While not necessarily the aim of SDM, increased teacher satisfaction and a more positive school culture may be products of SDM. Lange found

that when principals actively sought staff input prior to making decisions, teamwork and unity were fostered. Both principals and staff also developed new interpersonal skills, and trust increased. Staff gained a better understanding of the principal's role and the complexities of school management, and principals developed more trust in faculty judgment.

Position Statement on Shared Decision-Making
Tillamook School District Number 9

DEFINITION

Site-based decision-making for Tillamook School District is a collaborative process, based on trust, involving members of the local school/community in decision-making for that school. Included are decisions in establishing vision areas, identifying problems, defining goals, shaping direction, developing action plans, and ensuring implementation and accountability. The overriding objective is to promote the success of students: academically, socially, emotionally, and physically.

OUTCOMES

- Increased student success: academically, socially, physically, emotionally, and artistically
- Success, which includes knowledge, attitudes, skills, and behaviors
- Increased school/community communications
- Increased trust through improved school/community communications
- Increased community participation in their schools and programs
- Improved professional growth and career opportunities of the school/community
- Increased school/community trust, satisfaction, and support

NOTE: School/Community includes students, parents, staff members, Board of Education, and community members.

BELIEFS

- The school/community can make responsible educational decisions.
- Better decisions are made when the school/community is given the opportunity to make them.
- Accountability requires the authority, ownership, and commitment to make decisions.
- Each school/community is unique and shall capitalize on its diversity.
- The continued success of all students requires the shared vision and commitment of the school/community.
- Increased school/community involvement results in increased student achievement, effective use of resources, and a greater satisfaction for all participants in the educational process.

NOTE: School/Community includes students, parents, staff members, Board of Education, and community members.

BENEFITS

- Increases student achievement
- Results in consensus and commitment to goals
- Results in a greater degree of implementation
- Results in greater staff satisfaction and productivity
- Improves information flow and communication
- Leads to better decisions
- Creates ownership of decisions
- Provides more people with the opportunity to assume leadership roles in school improvement activities
- Results in more efficient use of available resources
- Results in a greater appreciation for each other's roles in the educational process

Source: "Shared Decision Making Position Paper," Tillamook School District, Tillamook, Oregon, June 1993.

Teachers in Oregon's School Improvement and Professional Development Program also reported both a greater willingness to collaborate and more effective collaboration (Paul Goldman and others 1991). The program, initiated by the Oregon Legislature in 1987, funds the development of school improvement plans that were initiated and administered by teacher-led site committees. Some teachers have reported more motivation and excitement in their work as a result of their new role in decision-making.

In shared decision-making, the principal actually gains support for the implementation of decisions, according to Sue Mutchler and Patricia Duttweiler (1990). They note, "Decision-making participants have a vested interest in the decision and all that is necessary to follow it through." The National Education Association, which has worked directly with more than five-hundred schools to develop SDM models, reports that involving more people *has* enhanced ownership (Sharon Robinson and Robert Barkley 1992). Collectively made decisions are usually easier to carry out, have more staying power, and gain greater acceptance.

Finally, a recent report on school reform in Chicago illustrates how increasing public involvement through local school councils led to substantial improvement in the classroom. Researchers found that schools with strong democratic climates were far more likely to be pursuing systemic change (Ann Bradley 1993). Sixty-six percent of "strongly democratic" schools were making such improvements and another 16 percent showed "at least some features of it." Schools were characterized as "strongly democratic" if their school councils met regularly, if teachers were actively involved in planning, and if principals sparked discussions about educational issues.

In contrast, more than 80 percent of the schools with "adversarial politics" were judged to be "unfocused" in their approach to reform—adding on programs, engaging in limited discussion of educational issues, and showing little teacher/collective activity. In schools where the principals "run the show," only 26 percent reported systemic change.

Disadvantages of SDM

The benefits of SDM should be weighed against its apparent inefficiency, an increased workload for participants, and the frustrations produced by a slower group process. In implementing SDM, teachers and administrators are asked to make significant change in their behavior; such change takes time and extra effort. Educators commenting about their firsthand experiences with SDM mention the time intensiveness of SDM and the increased duties and responsibilities that accompany the process. Some also mention mistakes they made, such as inadequately preparing and training

participants, or trying to do too much too quickly, which resulted in setback and failure.

The single most serious obstacle to SDM, claims Lange, is time. "There's no way around it," states James Mitchell (1990), "involving employees in administrative decisions is time-consuming, and that can be frustrating." Both administrators and teachers can become irritated by the length of time it takes to make decisions by committee or group, and teachers may feel pressured by the additional workload that SDM demands of them outside the classroom. Decisions are often slow and difficult, especially in the early stages, when staff are learning new skills.

Fortunately, however, there is a learning curve with SDM. As teachers and administrators gain skill with the process, their communication tends to become more efficient (Fred Lifton 1992). Stanford's Henry Levin (1990) found in his work with the Accelerated Learning Program that over time staff demonstrated "a rising sophistication and ability to make decisions over an ever-widening range of issues."

Doris Sanchez Alvarez (1992) characterizes the process as "cumbersome" and "time-consuming." But once SDM is in place, "most teachers will have a heightened sense of commitment to the organization and a new awareness of the role of the classroom teacher in the school organization."

Chapter 2

Participant Concerns

Both administrators and teachers may have fears, concerns, or a sense of reluctance about initiating or implementing SDM. These concerns need to be recognized and addressed.

Administrator Concerns

When surveyed by the Southwest Educational Development Laboratory in 1989, administrators expressed fear about relinquishing power to teachers or school councils as well as changing roles and responsibilities (Sue Mutchler and Patricia Duttweiler 1990). Some administrators view decision-making as a territorial issue. They may be more concerned with protecting their own turf than "seeing the big picture." Principals, noted one survey respondent, need to be convinced that "teachers [are] not going to take over the building, make all the decisions, and do away with principals."

Fear often clouds understanding of SDM, states Bauer. In addition to fear of loss of power, some principals also wonder whether the process will really lead to positive outcomes for students. Many also question whether they have adequate training, skills, and time to initiate and maintain the process.

SDM does not make the principal's role as a decision-maker obsolete, Bauer emphasizes. Rather, the principal is "part of a team of decision makers." The principal will probably continue to make decisions on issues that fall outside the scope of the SDM group or committees. Marianne Strusinski (199lb) examined leadership of SDM groups in Dade County, Florida. She found that administrators still had proportional representation on the school "cadres." "The presence of administrators on the cadre," she states, "underscores the fact that SBM/SDM is a cooperative arrangement designed to add teachers into the decision-making process rather than turn it over to them entirely."

Paul Goldman and others asked administrators in schools in Oregon's School Improvement and Professional Development Program whether teachers see administrators as "more or less central" to decision-making. One principal replied, "I think they see me as central, but I think they see themselves as powerful, too." This suggests that as decision-making opportunities grow, "power itself expands."

Teacher Concerns

Doris Sanchez Alvarez (1992), a principal, encountered teacher reluctance when she initiated SDM in her high school. Some teachers opted out because of lack of time to devote to the process. Others were only interested in making classroom-level decisions or were subject to pressure by colleagues to resist—perhaps because SDM was seen as just another fad. If principals decide to initiate change, Alvarez recommends that they be prepared to work with teachers over a long period, and seek to determine teachers' understanding of the meaning of the change.

In the SEDL survey, many respondents mentioned that teachers were unwilling to assume new responsibilities. In some cases, this may be due to teachers' lack of confidence in their decision-making ability. It may also be due to the extra time and workload involved. One respondent commented on the link between responsibility and accountability: "In the beginning, the newly empowered decision makers were, in many cases, frightened by the responsibility and the danger of being held responsible for mistakes" (Mutchler and Duttweiler).

Lack of trust is also an issue for teachers in some schools. If mistrust and apprehension exist between administrators and teachers, SDM will not be readily embraced by teachers. Survey respondents noted that trivial matters stored up over the years from lack of input impeded progress at their site. "Complaining sessions" were needed before any movement was made.

In Oregon's so-called "2020 schools" (a reference to House Bill 2020, the bill that initiated the state's School Improvement and Professional Development Program), where many teachers are involved in decision-making, some teachers are uncomfortable with the decline of the principal's role as the central authority figure and would prefer to have the principal make all the decisions (Goldman and colleagues). Strong norms exist against teachers' becoming involved in administration and exercising power. One team leader said that to some teachers "the very idea of power is a threat." These teachers typically left the "2020" school to work elsewhere.

Several SEDL survey respondents mentioned the strength of norms related to teaching roles and competency. One observed, "Almost all of this

district's problems . . . have been caused by the absence of real confidence in the decision-making capacities of subordinates and the importance of fostering latent abilities" (Mutchler and Duttweiler).

Sequence of Participant Concerns

Gene Hall and Gary Galluzzo (1991) outline various types of concerns participants tend to focus on when a change or innovation is being introduced. When use of an innovation such as SDM becomes "real" for the participants, their concerns center on "self," or their own performance. For instance, they might ask, "How will using SDM affect me? Am I capable of doing it?" As the innovation begins to be used, "task" concerns take over. People's thoughts focus on the time and procedures involved in using the innovation: "I seem to be spending all my time getting material ready."

Only when "self" and "task" concerns are resolved do participants express "impact" concerns. "Impact" concerns may be expressed through questions such as, "How is the use of this affecting kids and the school as a whole?" or "I have some ideas about something that would work even better." For the change process to be completed successfully, these stages of concern need to be recognized, addressed, and resolved, emphasize Hall and Galluzzo. This calls for ongoing support, training, staff development, and coaching.

Chapter 3

The Principal's New Role

For SDM to work, principals and staff must establish a collaborative partnership. This role is very different from the one learned by most principals and involves different functions and a different kind of power. Although to some principals the idea of having their role altered may be threatening, other principals welcome the demise of their role as lone decision-maker: "No longer did I alone have to justify the budget discussions for we were making decisions together," states Cecil Daniels (1990), principal at Myrtle Grove Elementary School in Opa-Locka, Florida.

Letting Go

Although the principal's role changes, the principal remains essential to the process and plays an important role in both establishing and maintaining SDM. "As a school executive, you are critical to the process," states Scott Bauer (1992). "But to make things work, you must truly let go of those decisions you decide to let the school council handle. There is no surer way to sabotage shared decision making and create an atmosphere of distrust than to override a decision you have delegated to a school council."

Principals in schools participating in Oregon's School Improvement and Professional Development Program described changes they've made in terms of "stepping back," "keeping their mouths shut," and "getting things started and letting them run" (Paul Goldman and others). One principal said that when someone would approach him with a question, he would direct the individual to the person or committee responsible for that area: "You have to be ready to let go and keep on letting go, so others know that they are really in charge of something and really take responsibility for it" (Goldman and others).

Becoming a Facilitator and Human Resource Manager

Principals participating in Oregon's school improvement program speak of using "facilitative power" to help staff develop and implement goals. They see themselves as "human resource managers," individuals who help acquire and organize resources. In addition to managing money, they also find space and time for staff to meet, rearrange scheduling, and help groups work together effectively. They try to find many ways to involve staff and provide regular feedback and encouragement. They share useful information and data regularly with teachers. An important part of facilitating also involves monitoring. According to Amie Watson and others (1992), "Minimizing distractions and other obstacles so that decision-making groups can meet and keep on track becomes a key function."

David Stine (1993) describes the principal's new role as that of organizer, adviser, and consensus builder, someone who utilizes the power of the group's thinking. Bauer refers to principals who engage in SDM as "internal consultants" rather than "decision makers." He suggests that principals offer input and provide school decision-making bodies with current research. Principals need to accept that they may not agree with all decisions that SDM councils or teams make and that some decisions will fail to bring about the desired outcomes. If this happens, it is important for the principal not to come to the rescue, but to be especially supportive of staff in these instances, say Judith Huddleston and others (1991).

Establishing and Maintaining a Climate of Trust

The principal plays a central role in establishing and maintaining the collaborative, trusting climate that is essential for SDM to take root and grow. The shift from "an autocratic to a democratic position," say Mutchler and Duttweiler, involves "supporting" and "enabling" behaviors, such as listening actively, creating opportunities for staff to express ideas, providing a supportive environment for collaborative planning, and establishing school goals and programs through staff participation.

The principal must create a noncompetitive, win-win school climate by promoting trust through modeling and teaching group skills (Meadows). Principals also need to model values and behaviors such as collaboration, equity, and professional development. These "set the direction and tone of the school in order for change to occur," state Goldman and colleagues. One teacher at an Oregon "2020" school commented, "He [the principal] makes it easier for everything to happen, because he has always modeled listening and caring about people's input."

"It is as important for us to admit our mistakes publicly as it is to announce our successes," states Meadows, who suggests deemphasizing perfectionism by valuing the self-worth of staff and by consistently recognizing things staff do well. Principals must resist forcing their solutions on staff so that the faculty "owns" the decisions and group trust is not damaged.

Developing Readiness

Principals are intimately involved in preparing schools for SDM, note Huddleston and colleagues. Some of the ways principals can accomplish this are by believing in the process of SDM, conveying trust in staff decisions, and recognizing that behavior changes are difficult and take time. Principals should not give up when teachers express a desire for a strong leader who makes all the decisions. They should open up channels of communication for everyone. "All staff members must believe that they can influence the final decision. For that to occur, procedures must be established for them to voice their opinions." In their new role, principals need to continually seek different ways to communicate with and involve staff.

Even though principals may have their own concerns about SDM, part of their role in establishing SDM involves addressing the concerns of faculty. "How well they address teacher concerns, work with those inside and outside the school, and develop a shared vision that guides day-to-day actions and decisions is a critical key to successful implementation of SDM," state Hall and Galluzzo.

Chapter 4

Preparation: Training, Skills, Knowledge

Lack of skills was one of eight barriers to changing traditional behavior that Mutchler and Duttweiler found when they surveyed schools using SDM. Thirty percent of respondents in the Southwest Educational Development Laboratory (SEDL) survey indicated a critical lack of knowledge and skills in areas needed to implement SDM at their site. Staff need training to develop the knowledge, skills, and attitudes that will help them to accept and then participate in SDM.

The Need for Training

Frequently, teachers make classroom-related decisions and administrators make school-related decisions without conferring with others. Thus most teachers and administrators are not accustomed to exercising collaborative decision-making skills (Hall and Galluzzo). Parent and community representatives may also need assistance in learning how to perform new tasks, as well as becoming comfortable with new roles and responsibilities. If this is not done, caution Hall and Galluzzo, "we could arrive at a place where 'more people are happier with dumber decisions'." Investing time and energy in preparing participants for new roles is one way administrators can prepare their schools for SDM.

The areas most frequently targeted for training are not normally covered in teacher education programs. For example, teacher education does not usually instruct students in management or group skills. Also, teachers traditionally do not assume management roles in their jobs, or work in groups to any great extent. Usually teachers are knowledgeable about their students, the subject matter they teach, and pedagogical techniques. "As they become

more collaborative, they have to learn what their colleagues are doing and what they need," note Paul Goldman and others (1991). If participants in SDM do not get support or "proper training," they may experience undue stress, state Larry Frase and Larry Sorensen (1992).

The ability to exercise "productive power is dependent in part on one's access to resources and information," say Phillip Hallinger and Don Richardson (1988). Teachers have traditionally been disconnected from other classrooms, other schools, and the central office. "In order to address issues and problems with others in the larger system," teachers need opportunities to obtain information about instruction, the students, and the school's needs.

True "empowerment," according to Peggy Kirby (1992), requires not only the opportunity to act (participation), but the ability to act (knowledge); therefore, teachers need to acquire "the knowledge necessary to warrant such authority." The rush to share decision-making, she contends, has not always been accompanied by "a concomitant rush to enhance ability."

Areas in Which Training Is Needed

Respondents to the SEDL survey indicated that SDM participants require special skills to move from solitary thinking toward collective thinking and group decision-making. Nearly one-fourth of the respondents reported insufficient skills in consensus decision-making. Sixty-two percent of the respondents listed decision-making skills as an area in which training is needed, while 75 percent indicated collaborative skills should be a priority in training (Mutchler and Duttweiler).

Decision-making skills include problem-solving and critical thinking, priority-setting, resource utilization, and the design of accountability and evaluation plans. Collaborative skills include consensus building, conflict resolution, team building, and commitment skills. Staff must be trained, note Mutchler and Duttweiler, to deal with the substantive and technical aspects of the issues about which decisions are being made.

Survey respondents also indicated that participants need to be knowledgeable about SDM. One reason teachers in Kentucky were reluctant to participate in SDM was lack of sufficient information about school councils (Jay Goldman 1992).

According to Strusinski (199la), the most commonly requested area for additional training in Dade County, Florida, schools is "professional skills" such as problem-solving and time management. The second most frequently cited area is "interpersonal skills" ("group relations" or "team building" was mentioned by half the schools). Followup training and support are crucial for new staff members and for the refinement of SDM.

Methods of Acquiring Training and Information

SEDL respondents suggested several approaches to training, skill building, and establishing a knowledge base. Some recommended the use of professional consultants or experienced facilitators to guide participants as they make the transition to SDM. One respondent said her school had hired a shared-governance specialist who, in addition to conducting training, served as a consultant to help the school deal with problems. Other survey respondents recommended a "train-the-trainer" approach, with selected staff undergoing training and in turn training their own faculty and community. Some suggested a "full staff approach," in which all staff participate in gathering information, gaining decision-making skills, and developing collaborative behaviors.

Outside consultants may be hard to find, states Mitchell. Few collaborative techniques are taught in teacher preparation courses. Schools where SDM is working can be a good source of qualified experts. Mitchell also suggests visiting and networking with other schools to discover how they are implementing SDM.

Principals can assist staff in building a knowledge base in particular areas; they might share research on curricular trends and provide opportunities to discuss concepts (Huddleston and colleagues). Faculty meetings or retreats can be used for inservice workshops to share ideas or build skills. The bill that enacted Oregon's School Improvement and Professional Development Program created new needs for "information generation and distribution," report Goldman and others. Principals stepped in to fill this need by circulating research to staff: "As [teachers] learn, their desire for more information increases" (Goldman and others).

Specific training models are sometimes used to prepare staff for SDM. Alvarez explains how Personalized Professional Growth Seminars (PPGS) helped teachers examine the culture and communication networks of their school and the norms and structures used for making decisions. Discussions provided a better sense of which decisions staff felt they should become involved in, and collaboration emerged as teachers shared ideas, materials, and plans. Perhaps the most important aspect of the seminars was the time they provided for practice and feedback. Before the seminars, the lack of adequate time to learn and understand the various roles in SDM had been a significant problem, Alvarez states.

John Russell and others (1992) describe how the Teacher Involvement and Participation Scale (TIPS 2) helps schools collect baseline data and identify issues that need attention. Another training model gives guidance on breaking problem-solving down into smaller units (Dianne Horgan 1991). Mayeski cites several leadership training programs for principals, such as the

Blanchard Training and Development Model, which includes group observation forms for effective versus ineffective groups. Mutchler and Duttweiler list training programs and resources recommended by SEDL survey respondents (see the Appendix for a partial list of these resources).

Learning by Doing: Informal Training

Oregon's School Improvement and Professional Development Program, state Goldman and colleagues, has created a climate in which teachers and administrators can develop the skills and behaviors necessary for sharing decision-making responsibilities. Rather than provide formal training in problem-solving, consensus building, or communication skills, the participating schools offer staff "real reasons to solve problems, seek consensus, and communicate." When training in group-process skills is presented, "it can be applied immediately to real situations that have meaning and value to the participants." Goldman and colleagues advise that programs designed to enhance SDM skills, in the absence of authentic situations in which participants can apply these skills, "will be unlikely to achieve the goal of enhanced participation in decision making."

Following skill training, whether formal or informal, staff members need a chance to practice new behaviors. In schools participating in Oregon's school improvement program, teachers are learning "on the job." "Much of the capacity to make good staff decisions and take responsibility for school outcomes," states Levin, "comes directly from practice or learning-by-doing. As school staff and community work at it, they become experts in the process."

Chapter 5

Guidelines for Implementation

If organizations such as the American Association of School Administrators, the American Federation of Teachers, and the National Education Association continue to push for the adoption of SDM, states Mayeski, "the diffusion of this innovation may accelerate. Within the acceleration lurks the danger of improper implementation."

Lew Allen and Carl Glickman (1992) recount problems that arose in the process of implementing SDM in twenty-four Georgia schools that joined with the University of Georgia's Program for School Improvement (PSI) to form the League of Professional Schools. PSI staff instructed each school to create a democratic decision-making process that fit its unique situation. They also suggested that schools consider using "direct referendum" as well as "representative governance," develop a process that allowed teachers to have equal rights and responsibilities with their principals in making schoolwide decisions, and refrain from giving any individual ultimate authority or veto power over areas targeted for SDM.

Neither the PSI staff nor the school staff, however, recognized "the importance of each school gaining an explicit, shared vision of exactly what it intended to do with shared governance." Problems and confusion arose when SDM was simply tacked onto existing power structures. Some schools ended up with several decision-making policies operating simultaneously, with SDM seen as just "another activity that some of the staff were doing" rather than "a fundamental change in the way schoolwide initiatives were generated and implemented."

Questions That Must Be Answered

Eventually, the staff at PSI and in the participating schools realized that they needed clarification on a number of aspects of the SDM process.

Without a clear understanding of the benefits of SDM, administrators and teachers would be more apt to fall back into traditional roles.

League schools wanted answers to the following questions: Who will be involved in SDM? What process will be put in place to ensure that those targeted will actually be involved? Who will make the final decision on issues? What will be the focus of participants' efforts? and What methods will be used to inform faculty of these efforts? Insufficient information in one or all of these areas, Allen and Glickman report, "was diffusing some schools' efforts and, in others, paralyzing them from taking any collective action."

Huddleston and others suggest agreement must be reached about what decisions will be shared, what groups will be involved at what stage in the process, what time limits will be set for reaching decisions, how decisions will be made (majority vote or consensus), and who is responsible for carrying out the decisions. A California school district that began SDM at the district level, instead of at school sites, developed "team agreements" during their training process that included groundrules and norms. "Taking the time to work out these agreements was critical for success," states Robert Kessler (1992).

The SDM Structure

Many schools develop one group, team, council, or committee to implement SDM; other schools use several groups or committees. In some cases, composition of the team is determined by mandate. Otherwise, schools need to decide who will be involved. Should students, parents, support staff, central-office staff, or outside consultants be included? What exactly should be the role of the principal? Should all teachers participate or only a select group? In League schools, staff members began to answer these questions based on what they wanted from their SDM model.

One Michigan high school found it beneficial to involve students in the SDM process. The school reported improved attendance, a reduction in the number and severity of discipline referrals, and a more positive school culture after involving students in the decision-making process (Jay Newman 1992). Francis Murphy (1992) believes it is important to include community members, as well as parents, in the SDM structure.

"The group must be large enough to be representative, yet small enough that it won't be cumbersome," states Stine. Groups of nine to seventeen members seem to work well. He suggests that half the members be teachers, with parents having the next largest representation. "Watch for special interest groups' attempts to 'pack' the council," cautions Stine. To

avoid this, he recommends electing two-thirds of the council and having that group then appoint others "to ensure gender, ethnic, and special interest balance."

SDM can take a number of forms; it is important to adapt it to each school's own situation, history, needs, and intent. For example, Kirby examined four schools that had participated in Georgia's Program for School Improvement. One school had a self-selected group of concerned high school teachers that evolved into a highly formalized council, with each member representing a small group of faculty. Another school's faculty advisory group became a leadership team elected by the faculty. Still another school had an informal system the principal called the "Y'all come" approach; when an issue or concern arose, an informal meeting was held and anyone interested was invited to participate. Chapter 7 includes details on other SDM groups and structures.

Who Makes Decisions and How

Should the SDM group make decisions or recommendations by voting or consensus? Will the principal have veto power or make decisions if the group can't agree on an issue? A number of groups choose to operate by consensus, which is very different from making decisions by voting. A Glenview, Illinois, school that has had success with SDM defines consensus as

> general agreement and concord. For consensus to exist, it is not necessary for every participant to agree in full, but it is necessary for every participant to be heard, and in the end, for none to believe that the situation violates his or her conviction. It is not necessary that every person consider the decision the best one. (Lifton)

Kessler describes how everyone listens carefully when a Management Team member objects to a proposal. Similarly, when members raise objections, they also offer suggestions. With the goal of consensus, everyone feels responsible for coming up with a solution instead of having the attitude, "It's not my problem, it's yours."

The decision-making sequence varies from school to school. For instance, Hall and Galluzzo note that preliminary work might be done by a task force. Or a committee might make recommendations to either the principal or the whole faculty. Or the committee's decision might be final. Some issues may be introduced by one group, endorsed by another, and approved by a third: "A schoolwide vision statement might be initiated by the leadership team, reviewed by individual faculty members and parent groups, and approved by the faculty at large" (Stine). Sorting through "this maze of

stakeholders" may pose significant challenges for SDM groups. Whatever the configuration and sequence, it is important that everyone understand the details of the process *before* a decision is made.

A Method for Gradual Evolution of Responsibility

Some schools may not be ready to move immediately into joint administrator-staff responsibility in the implementation of SDM. In Huddleston and colleagues' model, responsibility shifts gradually from complete administrative control to joint administrative-staff control; principals "thoughtfully move their staff through the participative stages." Staff will move in and out of phases with varying degrees of ease, depending on the individual school.

Huddleston and colleagues outline four participative phases. In phase one, or "Readiness," administrators establish a climate that will facilitate SDM. In this initial stage, the principal or administrators determine what decisions will be shared, who will participate, and the extent of participant involvement. Knowing it is best to start small, administrators involve only a portion of the staff in major decisions. They begin by involving staff members who are willing to give time and assume responsibility for SDM. Principals involve others in decisions that, regardless of the outcome, they will not try to overturn. In this phase administrators slowly build credibility for SDM and develop staff members who will be able to facilitate the process when the larger group becomes involved.

The next phase, "Experimentation," focuses on building comfort and familiarity with SDM. Administrators still structure the decision-making process, but the extent of involvement is up to individual staff members. Administrators seek to involve all staff in decisions that have schoolwide impact; to build staff confidence, they choose issues with low emotional content and those that have a high probability of being successfully implemented. Recognizing that staff will need opportunities to voice frustrations, they provide opportunities for staff to discuss both the SDM process and their feelings about it, and communicate the importance of openly discussing how the process is working.

In phase three, "Refinement Through Trial and Error," administrators begin to share with staff the process for decision-making as well as the decisions themselves. Teachers assist in determining what will be decided participatively and who will be involved. The staff also help to refine the process once the decisions are made. Principals encourage involvement in all aspects of school management and operation. They also work with staff to help them assume responsibility for decisions "by not rescuing them when things go wrong and by allowing them to receive credit when things go well." Once a broader range of issues are handled through SDM, principals

Figure 1
Responsibility Emphases

PARTICIPATIVE PHASES	AREAS OF RESPONSIBILITY			
	Decides which decisions will be shared	*Decides who will be involved*	*Takes responsibility for decisions*	*Monitors the process*
Readiness	Admin	Admin	Admin	Admin
Experimentation	Admin	Admin	Admin	Admin
Refinement	Admin/Staff	Admin/Staff	Admin/ Some Staff	Admin
Institutionalization	Admin/Staff	Admin/Staff	Admin/Staff	Admin/ Staff

Source: Huddleston (April 1991).

begin to accept that some decisions will succeed and some will fail. This attitude helps them to focus on problem resolution rather than blaming.

SDM becomes the norm in a school during "Institutionalization," the fourth and final phase. Based on the school's history, the SDM process may be either formal or informal. Staff and administrators reach agreement on which decisions will be shared and what process will be used. Staff members assume responsibility for their decisions and monitor their decision-making process, and both staff and administrators assume responsibility for informing each other when agreements have been violated. Administrators understand that the clarification of SDM parameters is ongoing, are sensitive to staff needs, and structure periodic reviews of the SDM process.

Even though staff responsibility grows with each phase (see figure 1), Huddleston and colleagues believe principals "can never abdicate responsibility for the decisions made," since they are the formal and legal heads of schools (Huddleston and colleagues).

Conditions That Facilitate or Impede the SDM Process

To learn what conditions seem to facilitate SDM, the League of Professional Schools identified key conditions created by various SDM processes used by each League school, listed these conditions according to their

ability to facilitate SDM, then condensed them into five continua, depicted in figure 2 (Allen and Glickman). Usually these conditions were not completely present or absent. There was also considerable overlap among the conditions; problems in one area often affected some or all of the other elements.

Unclear-Clear: The first continua had to do with the clarity of the SDM process. A clear process, in which at least the majority of staff understood what decision-making steps and procedures were to be followed, was crucial. When the process was not clear, staff felt confused and, in some cases, angry. For example, even if staff know that they are to reach decisions by voting instead or consensus, they still must have more information, such as whether a simple majority or a two-thirds majority is needed, and so forth. "Unclear processes created confusion that fragmented people's actions and undermined the implementation of shared governance," note Allen and Glickman. "Clear processes empowered people by giving them all an equal understanding of how business was to be conducted."

Nonoperational-Operational: Some schools created a clear process but failed to implement all or parts of it. Schools found it was not sufficient to simply write or articulate a SDM process. They also needed to monitor the process to be sure that agreed-upon procedures were being followed. Schools that strayed from their agreed-upon process had the same problems as schools with unclear processes—confusion and fragmented action.

Advisory-Decision-Making: Schools also had to make a clear distinction between decision-making groups and advisory groups. It was demoralizing for groups to think they had the authority to make decisions, only to find

Figure 2
Conditions of Governance: Process

NON-LEAGUE	LEAGUE	
Low	***Moderate***	***High***
Unclear	Democratic procedures clear process is *new*	Democratic procedures understood by all and institutionalized
Advisory	Groups make decisions for everyone else	Elected body or volunteers at large set priorities, make decisions, and assess results through schoolwide process
Policy in Place—*Not Operational*	Elected representatives or voluntgeers at large	
Representatives Appointed		

Source: Allen and Glickman (1992).

their decision vetoed. This problem occurred most frequently between principals and teachers. However, it also occurred between a leadership council and a task force when it was not clear whether the task force was to make a decision or simply a recommendation.

Appointed Representatives Versus Democratically Elected/Volunteer Representatives: Schools that used department chairs or grade-level teachers as their SDM executive committee often encountered problems because these leadership positions were usually filled by appointees: "Decisions made by a group of teachers appointed by the principal were perceived in some schools as top-down decisions. If everyone does not have equal access to the governance structure, there may be charges of favoritism." Even when the leadership team or committee was elected, that body could either appoint task forces or recruit volunteers. "Volunteer task forces give everyone the opportunity to participate as much or as little as they wish," Allen and Glickman state. "The more accessible the process was to all teachers, the more positive feelings they had for the process."

Low Degree-High Involvement: Schools that involved more people in the SDM process experienced a higher degree of faculty support and had fewer instances of misunderstanding. One school, for example, had more than 75 percent of its faculty involved in making decisions about schoolwide changes. The degree of involvement varied from school to school in the league and was usually closely tied to the other conditions.

The above "process" conditions were found in different stages and combinations throughout League schools, "creating a myriad of varying conditions of governance." At League meetings, school teams discussed the findings and then placed their schools on each of the five continua. This exercise helped establish a common language about SDM, identified problem areas, and aided schools in examining their process "in the light of their intent." By communicating "openly and precisely," despite the complexities and problems with SDM, most schools were "well on their way to establishing a clear, effective shared governance process by the end of their first year in the League," state Allen and Glickman.

Which Issues Should We Focus On?

The most difficult area of SDM, according to Herb Torres (1992), is not who should be involved or how, but what areas should be addressed. For his school district, this continues to be "the most difficult and sensitive issue in the whole process to resolve."

Stine believes most SDM issues can be classified into four general areas: curriculum and instruction, financial resources, human resources, and administration. Some decisions should remain with the classroom teachers,

others are appropriate for a specific department, while still others should involve the entire faculty or administration.

Allen and Glickman found that the issues League schools were focusing on were problematic. When the League began, it recommended to schools that they focus on curricular and instructional issues. The League thought it was giving schools sufficient guidance; it wasn't. "Staff members had a sense that they should focus on everything at once and were overwhelmed by the complexity of the task. They did not know where to begin," state Allen and Glickman.

Most schools were not ready to suddenly make all curricular decisions collectively; they needed help in understanding the importance of breaking issues down into small parts. The League encouraged schools to pick a single issue they believed they could handle using SDM, then slowly build on the number and complexity of issues, or perhaps keep a narrow focus indefinitely. "The point was," state Allen and Glickman, "schools needed to limit their focus to issues that fit the school's ability and/or readiness to address."

To facilitate this, the League compiled a list of issues that schools were currently addressing. Then they placed these issues on a continuum according to their perception of the issues' potential impact on student education (see figure 3). This continuum helped schools examine how they wanted to proceed: "It gave them a way to talk about the focus of their work and to make decisions about next steps."

Zero-impact issues, issues that do not have a significant educational impact, can have a dramatic influence on teachers' lives. (Examples of zero-impact issues appear in column 1 of figure 3.) Schools found it was easy to get bogged down with these issues and lose sight of the larger issue of making their school a better place for students to learn, Allen and Glickman point out. Some schools were not aware that their focus was *entirely* on zero-impact issues. When they became aware of this, they had to decide if this was what they intended.

Other schools focused directly on *core* issues, issues that are more directly related to student achievement and learning. (Examples of core issues appear in column 3 of figure 3.) They agreed not to address "maintenance" issues or appoint a task force to deal solely with "zero-impact" issues. No League school focused strictly on issues listed as having *comprehensive* educational impact. The term *comprehensive* simply describes the overall impact certain issues have on the school and "should not be understood to be of greater importance or to have a greater impact on teaching and learning" than do the core issues.

Figure 3
Focus of Governance: Educational Impact

NON-LEAGUE	LEAGUE		
Zero-Impact	*Minimal Impact*	*Core Impact*	*Comprehensive Impact*
Parking Spaces	Textbook Adoption	Curriculum	School Budget
Lunchroom Supervision	Parent Programs	Staff Development	Hiring of Personnel
Faculty Lounge	Inservice Days	Supervision	Deployment of Personnel
Sunshine Fund	Small Budget	Instructional Programs	Personnel Evaluation
Adult Recreation	Discipline	Student Assessment	
Bus Duties		Action Research	
Refreshments		Program Evaluation	
		Instructional Budget	

Source: Allen and Glickman (1992).

Helping Staff Focus on Significant Educational Issues

Why do many teachers, given access to schoolwide and curriculum decisions, choose to invest time and energy in "trivial" issues? In her study of four schools that had participated in the Georgia Program for School Improvement for at least two years, Kirby found that the school leadership teams often focused on issues such as smoking in faculty lounges, lunch-duty schedules, and student-discipline policies. More significant concerns were also addressed, including a comprehensive staff development program, a school-within-a-school for at-risk students, and cross-grade-level planning.

Kirby offers four propositions regarding the focus of SDM teams or committees. First, the kinds of issues addressed by staff may change over time. Unless a professional culture that favors collaborative decision-making already exists, there may be a need to begin with managerial or "housekeeping" issues. Thus SDM groups, Kirby asserts, will be more likely to address issues of greater significance if minor faculty concerns are resolved first; this fosters trust in the process and facilitates a more professional culture.

Second, SDM teams that limited the scope of their activities to schoolwide instructional topics were less likely to spend time on

noninstructional issues. Initial clarity over roles and purposes may have kept the group on track and enabled them to focus their work "through formal structures for goal setting, determining agendas, and reaching decisions."

Third, issues addressed by SDM bodies may gradually focus more on global and instructional issues. For example, when faculty members at one middle school initially listed their concerns, they focused on managerial issues. A year later, when staff met in teams and developed priorities, each of the teams listed only curriculum and instruction issues. "Individual concerns are less likely to surface as priorities for shared governance when more people are involved in the task of prioritizing," states Kirby. "Further, less perfunctory involvement results when those willing to do the necessary work for improvement are those who decide which issues to tackle."

Finally, Kirby says knowledge plays a role in the kinds of issues staff choose to decide. Faculties willing to tackle schoolwide instructional concerns are more successful "when they engage in deliberate and thorough investigation of available alternatives, disseminate this information to others, and analyze consequences of preferred solutions before choosing among alternatives" (Kirby). It helps, therefore, to have a database, such as school effectiveness criteria or literature reviews, that is both comprehensive and objective.

The following chapter highlights important points to remember when implementing SDM, so that the rewards of SDM will outweigh the risks.

Chapter 6

Lessons Learned from Pioneers

A number of consultants and participants in SDM offer firsthand advice on what is necessary to successfully implement and maintain the process and avoid pitfalls.

Start Small, Go Slowly

Evidence on the adoption of innovations, state Hall and Galluzzo, suggests that SDM will be most successful if it is carried out in small steps instead of through "wholesale changes." Analyze your school's needs, then adapt selected processes that fit your local situation. Additional components can he added when staff are ready.

Provide Training

View training and making information accessible as necessary preparation for SDM, as well as an ongoing need. Principals have a responsibility to provide training to all levels of staff. As mentioned in chapter 4, Lange believes inservice training should be given "simultaneously" to both central office and school staff members.

Be Clear about Procedures, Roles, and Issues

The need for clarity cannot be overemphasized. Steps for decision-making need to be carefully considered and articulated, and schools need to pinpoint the issues to be resolved. When Mayeski, a researcher, intervened in a Wyoming high school where there was staff unrest over SDM, she found

confusion about roles. Teachers also complained that the decision-making process was rarely identified before a decision was made. During meetings Mayeski attended, "a standard procedure for decision-making was not followed." Not surprisingly, fewer than two-thirds of the decisions made by the Faculty Advisory Council were accepted and implemented by the faculty!

Meadows, principal of Juchem Elementary School in Broomfield, Colorado, found it helpful to spell out the SDM process in writing. This clarified her own thinking, served as a starting point for discussions with staff, and became a way to "introduce new staff members to SDM."

Build Trust and Support

It is important to allow time for trust to develop among staff and the community, which Mitchell claims takes between two and seven years. Trust is so important to the process that if trust is absent, SDM will not work, no matter what formal programs or structures have been agreed upon (Lifton).

Support is also crucial, from both within and outside the school. A majority of respondents in the SEDL survey who listed "lack of hierarchical support" as one of the barriers to change stated that their school lacked "full system commitment" to SDM (Mutchler and Duttweiler). "If the culture outside the school does not change," state Hall and Galluzzo, "those inside the school will find it difficult to take charge of decision-making." District office personnel, school board members, and state policymakers can help by relinquishing certain decisions, being willing to accept diverse decisions from different schools, and being flexible about changing or adapting many of the operating rules and regulations.

Principals can facilitate support for staff include by providing adequate time for meetings, reducing teaching loads, providing waivers from contracts and regulations, and changing schedules to permit collegial work to occur.

Do Not Insist on Participation

It is unrealistic to expect all staff to want to be involved in SDM, and making participation mandatory is usually counterproductive. Frase and Sorensen found that teachers with "high growth needs" tend to welcome collegial opportunities; some teachers simply choose to place all their energies in the classroom. In third-year surveys of Dade County, Florida, schools using SDM, Struskinski (1991a) noted the initial sense of urgency to get everyone involved had decreased. Schools were beginning to recognize that 100 percent involvement is unrealistic, especially considering the increased workload that accompanies SDM, which some teachers are unable or unwilling to undertake.

In the beginning, however, principals may have to "actively recruit" staff or community members to participate. If all else fails, they may have to appoint staff members to councils and enlist parents and others from community groups or booster clubs (Lange).

Use Conflict Creatively

"Controlled conflict," when experienced in a supportive setting, can be a positive force. Meadows states, "Creative solutions involving many ideas are often the result of allowing some conflict to occur. If there is no opportunity to air conflict, destructive adversarial relationships may result." It is important for staff to affirm each other's individual worth. This facilitates an atmosphere of safety in which staff can disagree. Meadows' school welcomed different points of view "as long as we made decisions that benefited our students." Failing to resolve conflicts and placing blame on individuals or SDM does not benefit either students or the school.

Williams (1992b) suggests that conflict can be "a healthy change tool." She recommends dealing with conflict as it arises, using the consensus model to resolve conflicts, agreeing on the rules for a "fair fight," recognizing cultural differences in conflict resolution, and looking at various methods groups use to solve problems.

View Failure as an Opportunity

Support in times of trouble is critical, state Huddleston and others. Principals need to remind staff that SDM is slower and often more frustrating than centralized decision-making. They should also involve staff in problem-solving to try to discover reasons for the failure and ways to avoid the problem in the future. Effective administrators "demonstrate their belief in participative decision making even when the process is not working well."

On the other hand, Kirby found that success is a great motivator. One high school she studied dealt with issues that seemed trivial, but "early successes engendered further commitment and participation. Eventually, mounting success with shared governance began to create more demand for problem resolution." Therefore, use every opportunity available to build self-confidence with SDM.

Find Ways to Deal with the Issue of Time

One of the things most schools struggle with is finding the time to implement SDM. "The biggest problem in change is not needing more

money, it is needing more time," one educator commented to Goldman and others. SEDL survey respondents, note Mutchler and Duttweiler, mentioned a desire to have more time for figuring out "'new ways of doing things,' time for training in new skills, time for decision-making bodies to meet, and time to 'play out the group dynamic' that is necessary" for effective SDM. Considering that teachers and administrators are already overloaded with work, the acute nature of the time barrier becomes evident.

Research on change, state Hall and Galluzzo, suggests that it takes three to five years for real change to occur: "To expect structural and procedural change in less time is unrealistic." For instance, local school councils need time "to struggle to identify the new roles and functions of their members." One in four schools implementing the Reaching Success through Involvement (RSI) restructuring process fails to achieve many of its aims because the time needed to work on improvement and change is not made available (Jay Newman 1992).

What can be done? Mitchell suggests committing additional resources, such as part-time help, to ease the increased workload that accompanies SDM. Some Dade County, Florida, schools have initiated "modest supplements" to teachers involved with SDM, while other schools give compensatory time on teacher work days (Strusinski 199la). "As roles change and time requirements become more demanding, matching salaries to new responsibilities must be evaluated," states Lange. He adds that meetings should be scheduled "to allow for meaningful discussion in a nonhurried way." Meetings should also be scheduled at a time when staff are not exhausted from a long school day (Amie Watson and others 1992). There is also a strong need for schools to "create" time (the University Elementary School in chapter 7 provides some ideas).

Share Accountability

Williams (1992a) suggests holding decision teams accountable for performance, both individually and jointly. Allow the team to decide in advance how it will evaluate its progress. Lange recommends developing a school profile based on indicators such as attendance rates, graduation rates, and test scores that can serve as "bottom line accountability" for each school. The profiles can serve as baseline data that can be used to evaluate the SDM process. Note, however, that shared accountability involves ownership of both the problem and the solution. SDM, Kirby concludes, "may be an easy concept to sell; shared accountability is less appealing. Changing working relationships to include trust and respect may be a prerequisite for accepting the risk that accompanies accountability."

Chapter 7

Examples of SDM Programs

This chapter provides a glimpse into how SDM is working in particular schools and districts in four states—Texas, California, Florida, and Oregon. Based on published descriptions of the programs, these brief sketches allow readers to sample the diverse ways in which schools have shaped SDM to fit their individual needs.

The Colorado Independent School District, Texas

Four years ago, the Colorado Independent School District in rural Texas was stagnating, and faculty and administrators gave school improvement efforts little support. But when a principal and two teachers heard a Georgia high school teacher discuss a "shared governance" plan, they knew they had "found what we were looking for," say Kathlyn Arthur and others (1992). The plan was "not a New York City answer to a west Texas town, but a viable approach that had worked in a Georgia school district similar to our own."

To introduce the plan, developed by Carl Glickman, a professor at the University of Georgia, a family retreat was held—a one-day voluntary training session for all district employees. The district could not afford to pay teachers to participate, but offered professional training credit instead. More than 85 percent of the staff attended.

Although each school developed its own unique SDM structure, the system used at Colorado High School has been especially successful in involving teachers in decisions. The principal and six department heads serve on an executive board charged with reviewing staff recommendations. The principal is a permanent member of the board, but teachers serve staggered, three-year terms. Each teacher on the executive board chairs a liaison committee of five or six teachers that meets monthly to discuss issues and concerns of staff. These committees then pass on suggestions to the executive

board, which determines the issues that are "uppermost on staff members' minds."

When a major issue arises, a task force—composed of volunteers and at least one executive board member—is formed to explore possible solutions. The executive board votes on the task force's recommendations. If the vote is not unanimous, the recommendations are returned to the task force for refinement. All recommendations approved by the executive board are then reported to the entire staff "as matters of information or to help build consensus." Any major changes need the approval of 85 percent of the staff.

"Although the system might sound bureaucratic," state Arthur and colleagues, "we've found it a successful way to make the best use of our staff. Teachers can choose the kinds of issues they want to get involved in and decide how much time they want to spend working with a liaison committee or task force."

Overall, SDM is working well in the district. The biggest problem seems to be the time it takes to make decisions using an SDM approach. No one is paid for the work and not all teachers are willing to donate extra time. Although administrators sometimes revert to making decisions without consulting teachers, "the administration strongly supports the shared governance concept and willingly listens to concerns about hasty, top-down decisions, making adjustments where necessary."

Also, teachers sometimes feel frustrated that change is not happening more quickly: "We have come to realize, though, that change takes time. Having a committee structure—in which all decisions are carefully researched and discussed—keeps us from acting too hastily and making real mistakes."

The community learned that informed, involved teachers can make significant contributions to school improvement, and that "no one person need bear the entire burden for education's success or failure."

University Elementary School, Los Angeles

SDM began at University Elementary School (UES), a laboratory school operated by UCLA's Graduate School of Education, with the arrival of a new director in 1982. Richard Williams came to the school with a desire to implement participatory management. First, he met with staff to design a new decision-making structure for the school, making suggestions but never imposing his own will. Over several years, a "bottom-up" structure emerged, "with decision-making power firmly invested in the hands of UES teachers" (Watson and others).

Teacher teams with members from each teaching level (early, lower, middle, and upper childhood) form the school's basic governing unit. These

teams operate semiautonomously. They decide, for example, what programs to teach, how to spend their budget, and what form parent contacts should take. The school also has "advocacy groups" that plan curriculum, rather than having each individual teacher or team plan its own curriculum. These groups are composed of an administrator and one teacher from each level with expertise or personal interest in specific curricular areas.

While teachers make most of the decisions directly affecting their students, schoolwide decisions are discussed in a formalized decision-making body. The Administrative Research Group at University Elementary (ARGUE) is composed of the director, principal, assistant principal, and one teacher from each level "chosen and empowered on certain issues to make decisions for the level." All advocacy group recommendations are also presented to ARGUE for approval and dissemination. ARGUE does not initiate many decisions. Instead, teachers from various teaching levels, advocacy groups, and sometimes parents bring before the group issues affecting the whole school.

In addition to facilitating and monitoring, administrators at UES function as advocates for the students and oversee all teachers' decisions with students' welfare in mind. The shared goals developed at a two-day annual retreat, planned by a group of teachers and administrators, provide a basis for working out differences that emerge during the year. For example, if administrators disagree with a team's decision, they can review the common mission and say, "Let's look at what's best for kids." Teachers might end up agreeing with them or "persuading them that the original decision better fits the school's goals."

UES has had success with SDM, Watson and colleagues believe, because it has moved slowly and found ways to create time for the necessary meetings and work. For example, the school includes twenty "pupil-free" days in the calendar. Administrators and other staff members, such as the school nurse and psychologist, also plan activities for the entire school, which frees up teachers for four additional half days per year. Meetings are generally scheduled outside the regular school day, "not at 3:30 when everyone is tired."

UES teachers "do not operate with unbounded freedom," state Watson and colleagues. "They must abide by certain assumptions and constraints determined by ARGUE, the administrators, and the shared philosophy elaborated at the annual retreats. Overall, however, the structure we have developed has brought liberating results for teachers."

Dade County, Florida

The Dade County Public School System is the fourth largest district in

the nation, with 271 schools spread across a large metropolitan area (Strusinski 199la). The district serves over 290,000 students from diverse ethnic backgrounds, and it is growing by about 4 percent each year, due partly to an influx of refugees.

In 1987, Dade County introduced SDM in thirty-three schools. These schools were given little direction except that they were instructed "to design a shared decision-making council of some sort" and plan at least one innovative project. A series of informational meetings and workshops were offered to help schools get started. "What evolved," states Strusinski, "were 33 unique SBM programs with 33 different shared decision-making (SDM) bodies."

These bodies are called by different names, depending on the school, but the most frequently used term is "cadre." In some schools, the SDM body is composed of representatives of the school's instructional staff; in other schools, paraprofessionals and ancillary staff are also included. At least one administrator participates. However, whether the administrative representatives have veto power on decisions varies. Some schools limit decisions to those that directly affect students and curriculum. Other schools extend decision-making to the overall budget and staff hiring. The underlying philosophy of the SDM program, states Strusinski (1991a), is "to let the individual school determine the exact nature and extent of their program" so that creativity is fostered.

The first few years following the introduction of SDM were characterized by trial-and-error learning. Workshop training was "rudimentary and theoretical in nature" (Strusinski 199la), thus participants had no practical experience and few role models to draw on. Other schools have since been added to the project, and administrators and staff are both learning new skills.

After both the second and third years, surveys were conducted. In the latter survey (Strusinski 199la), interest focused on two areas: (1) the need for additional training, and (2) efforts geared toward maintaining and increasing staff participation (staff in almost two-thirds of the schools said they were concentrating on this goal). Five schools assigned every staff member to a committee or specific role to enhance participation. Others used invitations to encourage attendance at open meetings; some schools even held meetings in a social setting, such as a restaurant.

Time remains a problem with the extra work that SDM requires. Participants don't routinely receive compensation, though some schools have initiated "modest supplements" or compensatory time on teacher work days. Strusinski (199lb) found that three-quarters of the most active cadre members were classroom teachers: "Coupled with the finding that most cadre chairs are also classroom teachers, it would appear that teachers are assuming an increased workload that SBM/SDM brings"— and doing so willingly.

Unlike the previous year, in the third-year survey, over twenty schools reported that there were no changes in the conduct of meetings. Strusinski (199la) posits that many of the "kinks" in the process had been worked out.

North Eugene High School, Eugene, Oregon

SDM has evolved gradually at North Eugene High School since a new principal was hired in 1984. Bob Anderson, a former coach, believes strongly in a team approach and in empowering others. During Anderson's first years at the school (which has 1,000 students and a certified staff of over 60), he solicited input from teachers, then made decisions based on staff ideas and concerns. However, merely obtaining staff input does not constitute SDM, contends Anderson: "You need to sit down with folks and make decisions together, so that they take ownership and responsibility for the decision" (Lynn Balster Liontos 1993).

Decisions at North are based on research, made by consensus, and intended to be in the best interest of students and their education. Unlike most schools, North Eugene does not have one process that is used for making all decisions, nor do they have one formal SDM body. In general, the process begins when different groups or committees bring proposals to staff meetings where concerns, complaints, and suggestions are raised. Then the groups rework their recommendations and bring them back to the entire staff for a final decision.

Teachers, notes Liontos, say they have not ever seen Anderson make a final decision, though they know he makes some "nuts and bolts" ones. Anderson said that staff generally make decisions concerning curriculum and instruction and have not wanted to be involved in decisions affecting school climate or personnel "cuts." He believes it is time to increase the range of decisions that are made collaboratively at North. One of the reasons North seems to be so successful with SDM is that Anderson possesses a great deal of patience and has moved slowly, following clues to gauge staff readiness for the next step.

Frustration about SDM at North focuses on lack of clarity. "We have lots of committees and groups and lots of involved people, so sometimes it's hard to tell where the decision is going to finally be made," said one counselor. Some staff believe it would be beneficial to outline the process in writing. Others are frustrated by the difficulties that sometimes arise in the consensus process, particularly with the whole staff. Anderson acknowledges that it is really "majority consensus" that takes place in faculty meetings.

Nevertheless, teachers work hard at North and put in many extra hours willingly on SDM work because it allows them to influence the direction of the school. "They know what they do counts" states Liontos, and believe it is *their* school.

Conclusion

It looks as if SDM is destined to remain a primary school reform issue. Nonetheless, SDM is not a panacea for all our educational problems, nor is it a "quick fix." It involves major changes for principals, staff, and school districts. As Bauer cautions, "You cannot expect miracles overnight." At the same time, SDM "offers tremendous potential to improve schools,"states Lange.

SDM is similar to the Theory Z concept, which has been used so effectively by the Japanese in their ascendance as a world power, and to Total Quality Management. A premise of SDM, Lange says, is "to allow those closest to the problem (principals, teachers, support personnel, parents, and community members) to provide direct input into the design of the solution." Lange emphasizes, however, that this "valuable resource" should be considered "a piece of the larger puzzle" of restructuring that may help bring about the fundamental change that national, state, and local groups are demanding in our schools.

Appendix
Training Programs and Resources on Shared Decision-Making

Following is a partial list of training programs and resources listed by participants in a 1989 Southwest Educational Development Laboratory survey on shared decision-making. Question 3 of the SEDL survey asked, "What training resources or programs have you used that you would recommend?" A more exhaustive list of resources appears in an SEDL report by Sue Mutchler and Patricia Duttweiler that summarizes the survey findings. The contents should be interpreted not as recommendations by SEDL staff but as a compilation of practitioners' recommendations. For some resources, specific categories of assistance are identified in italics.

Various training needs
Phil Schlechty
Executive Director
Gheens Academy
4425 Preston Hwy.
Louisville, KY
(512) 473-3319

Various training needs
Ken Jenkins
Dept. of Leadership & Higher Education
School of Education
Appalachian State University
Boone, NC 28608
(704) 262-6093 or (704) 262-2214

Group process/situational leadership
Ken Blanchard
Drea Zigarmi
Blanchard Training and Development
125 State Place
Escondido, CA 92025
(619) 489-5005

School Council Assistance Project
College of Education
University of South Carolina
Columbia, SC 29208

Quality circle facilitator training
Quality Circle Institute
PO Box 1503
Dept. 1029
Red Bluff, CA 96080-1335

John Champlin
National Center for Outcomes Education
15429 Richmond
Fountain Hills, AZ 85268
(602) 837-8752

Onward to Excellence Program
Northwest Regional
Educational Laboratory
101 SW Main St., Suite 500
Portland, OR 97204
(503) 275-9500

Nominal group techniques
Marvin Fairman
University of Arkansas
Fayetteville, AR 72701

Group processes, shared decision-making
Bruce McPhearson
Western Carolina University
NC Center for the Advancement of Teaching
Cullowhee, NC 28723
(704) 227-7211
fax (704) 227-7202

Redesigning the innercity school: the Comer process
James P. Comer
Yale Child Study Center
Yale University
230 Frontage St.
New Haven, CT 06510

Elenore Freedman
New Hampshire
School Improvement Program
244 North Main St.
Carrigan Commons
Concord, NH 03301
(603) 224-5444

School-based management
Bette L. Lewis
NSPRA School
Communication Kit
for School-based Management
Martin Luther King Academic Center
4545 Ammendale Rd.
Beltsville, MD 20705

Leadership style inventories
Jackie Savage
Public School Forum
400 Oberlin
Suite 220
Raleigh, NC 28605
(919) 832-1584

Accountability models
School of Education
Ferguson Bldg.
University of North Carolina
Greensboro, NC 27412

Carl Marburger
National Committee
for Citizens in Education
10840 Little Patuxent Parkway
Columbia, MO 21044
(301) 997-9300

Robert McClure
National Education Association
1201 16th St. NW
Washington, DC 20036
(202) 966-8142

Visioning/goal setting
differentiated staff models
Jackie Savage
John Dornan
Public School Forum
400 Oberlin Rd.
Suite 220
Raleigh, NC 28605
(919) 832-1584

Various training needs
Mid-Continent Regional Educational Laboratory
12500 E. Iliff Ave.
Suite 201
Aurora, CO 80014
(303) 337-0990

This list has been adapted from "Implementing Shared Decision Making in School-Based Management: Barriers to Changing Traditional Behavior," by Sue Mutchler and Patricia Duttweiler (1990).

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